



ClientTrack™

PA HMIS – Exit Enrollment

This quick reference guide outlines the components of the ClientTrack HMIS solution related to exiting a client from an existing enrollment. A project exit marks the end of a period of continuous supportive or residential services provided to the client and is the same for all workgroups and project types.

Exit Enrollment

To exit a client from an existing enrollment, navigate to the client's dashboard.

Home Clients Shelter

Find/Add Client

First Name: Pa
Middle Name:
Last Name: Sm
Full Name (Last, First):
Social Security Number: - -
Birth Date:
Client ID:

Enter search criteria into the parameter fields to narrow the displayed results.

Search


1 record found.

First Name	Middle Name	Last Name	Suffix	SSN	Birth Date	Gender	City	Home Phone	Household	Owned By Your Organization
Paul		Smith		XXX-XX-		Male			Smith, Phil - 54	No (Global Client)

Double Click on the client name to display their dashboard

Helpful Tip: Clicking on the **Search** button without entering filter criteria displays all clients in the system.

Paul Smith's Dashboard

Paul's Enrollments	
Enrollment Description	
▲ Current	
	HMIS Transitional Housing Program

Click on the blue action arrow icon next to the enrollment to be exited and select **Exit the Enrollment**



Edit Enrollment



View Case Members



Add Family Member to this Enrollment



Review Entry Assessments



Perform Annual Assessment




Exit the Enrollment



Delete Enrollment

Select the exit date, destination and reason for leaving

Exit Date: * 10/17/2014 

Destination: * Jail, Prison, Juvenile Detention Facility

Reason for Leaving: Criminal activity/destruction of property/violence ▼

If the case assignment is ending, check the corresponding box

Assigned Case Manager(s): Kamrin Carver 


End Case Assignment(s): ☒ 

Assessment Date:* 10/15/2014

Assessment Type:* Exit

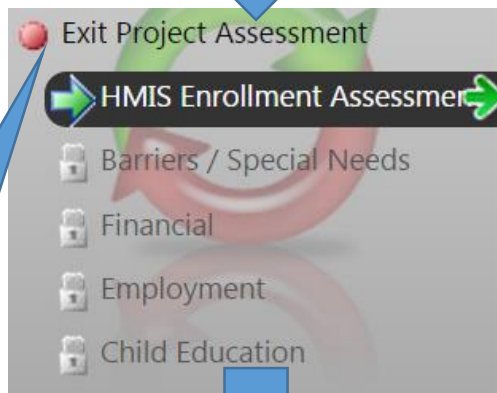
Program:* HMIS Transitional Housing Program

Assessment Sharing: Shared

Restriction:* ☐ Do Not Share Transaction  ☒ Share Transaction

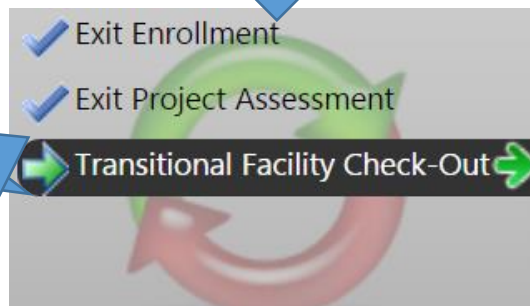
Select the date and sharing restriction before clicking **Save**

Complete the required exit assessments; if there are no changes, click the **Default Last Assessment** button

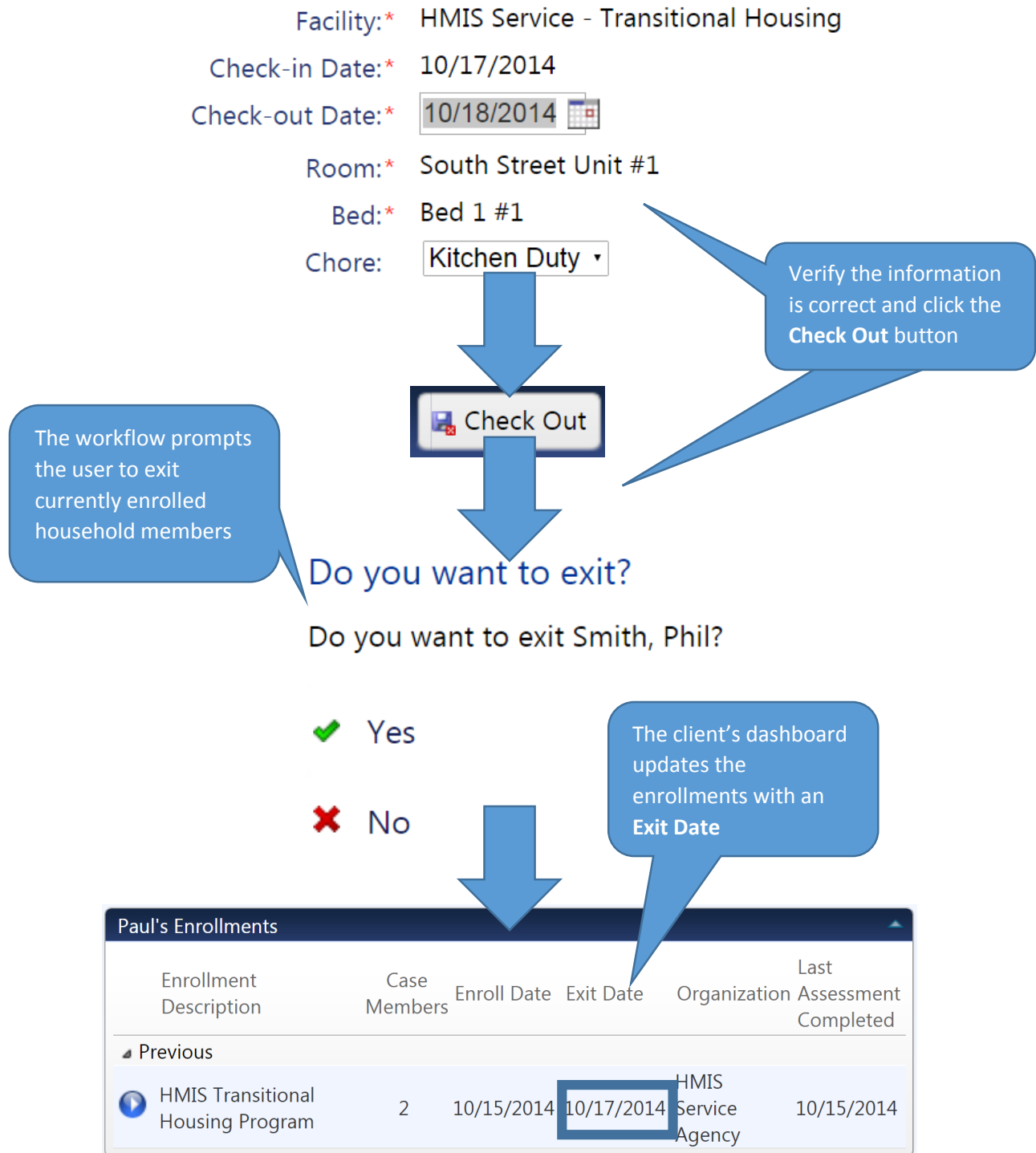


Default Last Assessment

After completing the **Exit Enrollment & Exit Project Assessment** steps, the system prompts the user to check the client out their facility room/bed for residential projects that are using inventory



Helpful Tip: If the user has not been checked into a facility, the workflow skips this step; otherwise it serves to maintain data integrity.



Check-in History

Shelter residents can be manually edited, viewed, deleted and checked-out of a facility if necessary.

